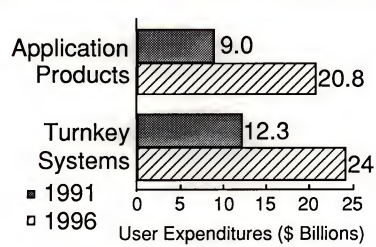
Western Europe

Applications Solutions Market



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ESP- 1

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Application Software Products, Western Europe

Leading Vendors. 1990

Company	Revenues ($M)	Mkt. Share (%)
IBM	340	4
Microsoft	250	3
Lotus	240	3
SAP	180	2
CA	170	2

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Application Software Products, Western Europe

Equipment Platform Analysis

Subsector	User Expenditures ($ Billions) 1991	CAGR (%)	1996
Mainframe	1.0	3	1.2
Minicomputer	2.9	14	5.6
Workstation/PC	5.1	23	14.0

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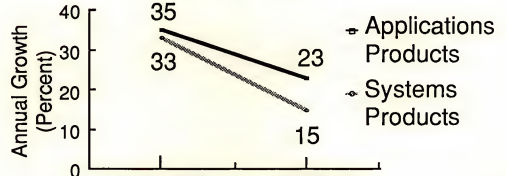
Systems Software Product Growth Declines in Western Europe



ESP- 4

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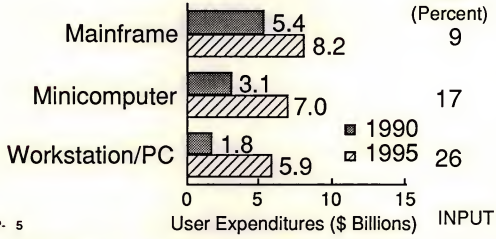
Western Europe, 1990-1995

Systems Software Products Market



ESP- 5

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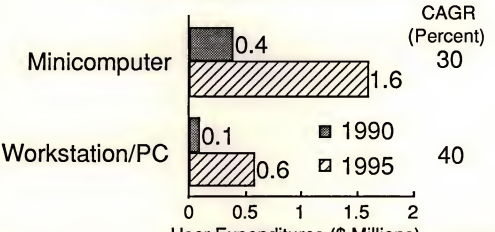
Western Europe, 1990-1995

The Impact of UNIX



ESP- 6

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Leading Vendors—Western Europe, 1989

Systems Software Products

Company	Mkt. Share (%)	Revenues ($ M)
IBM	25	2,255
Digital	8	700
Siemens	6	560
Bull	4	360
ICL	3	265

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Leading Independent Vendors—W. Europe, 1989

Systems Software Products

Company	Mkt. Share (%)	Revenue ($M)
CA	2	215
Oracle	2	195
Software AG	2	155
Microsoft	1	85
Cincom	1	65

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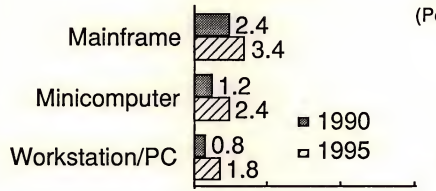
Western Europe, 1990-1995

System Control Products Market



ESP- 9

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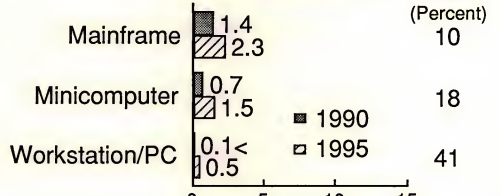
Western Europe, 1990-1995

Operations Management Tools Market



ESP- 10

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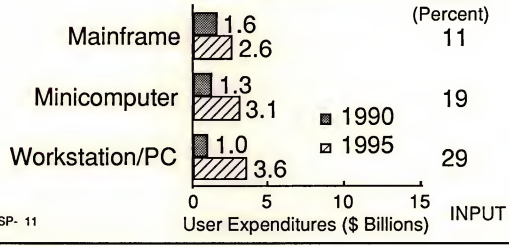
Western Europe, 1990-1995

Application Development Tools Market



ESP- 11

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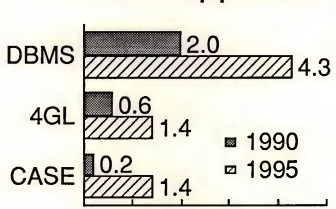
Western Europe, 1990-1995

Application Development Product Opportunities



ESP- 12

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Application Software Products, Western Europe

Country Markets

Country	User Expenditures ($ Billions)		
	1991	CAGR (%)	1996
France	2.3	20	5.9
Germany	1.5	18	3.4
United Kingdom	1.3	14	2.6
Italy	1.3	16	2.7

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SAP

Heritage	Mainframe-based accounting software
Strengths	Level of functionality German client base

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SAP

Focus	Developing midrange market New technology
Direction	UNIX and AS/400 Increased global presence

ESP- 15

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